**GENERAL INFORMATION:**

**Case studies:** To be submitted using this template form. Entries to be no longer than 750 words and submitted in PDF format.

**Stats & Testimonials:** All submissions should include stats and testimonials as supporting evidence (to be supplied in PDF format).

**Adviser Company Awards:** Please provide evidence over a 3-year period of turnover, profit, number of advisers and support staff (and of those advisers, how many actively sell protection) and the percentage of clients who take out protection products based on your firm’s advice.

**Award Category Definitions:** Details can be found at the end of this document.

**YOUR ENTRY SUBMISSION:**

|  |  |  |  |
| --- | --- | --- | --- |
| Award Category: |  | | |
| Company Name: |  | | |
| Name of person submitting award entry: |  | | |
| **Business statistics:** | **2020/21** | **2019/20** | **2018/19** |
| Turnover: |  |  |  |
| Profit: |  |  |  |
| Number of advisers: |  |  |  |
| Number of support staff: |  |  |  |
| Number of advisers actively selling protection products: |  |  |  |
| Percentage of clients taking out protection products based on advice given: |  |  |  |

Please tell us, in no more than 750 words, why you should be considered for this award category:

|  |
| --- |
|  |

**AWARD CATEGORY DEFINITIONS:**

# Adviser Company Awards:

* **Best new protection adviser firm (established in last 24 months)**

*Entries are invited from companies who have entered the protection advice space in the past 24 months and can demonstrate how they have grown their business, built a client base and provided excellent protection advice.*

* **Protection network of the year**

*Submissions will demonstrate how the network has supported their members in providing better protection advice by delivering training, support materials etc., what they do to ensure consistency of advice across member firms, what the split of business is across protection, mortgage, etc (and how that might have changed in last 3 years).*

* **Protection advice firm of the year**

*Submissions will demonstrate how the advice firm has supported its advisers in providing better protection advice by delivering training, support materials etc., what they do to ensure consistency of advice across the firm, what the split of business is across protection, mortgage, etc (and how that might have changed in last 3 years).*

* **Best protection advice from a mortgage adviser**

*Demonstration by a mortgage adviser of how they increased the amount of protection sales in their business, how they ensure protection is discussed with every client (and that discussion is followed through) and how protection plays a role in their ongoing servicing of clients. Entry to be supported by statistics to explain split of business and how protection sales have increased.*

* **Best protection advice from a wealth firm**

*Demonstration by a wealth firm of how they increased the amount of protection sales in their business, how they ensure protection is discussed with every client (and that the discussion is followed through) and how protection plays a role in their ongoing servicing of clients. Entry to be supported by statistics to explain split of business and how protection sales have increased.*

* **Best protection support group/compliance service**

*Submissions will focus on how the support group/compliance service has supported their members in providing better protection advice by delivering training, support materials etc., and what they do to ensure consistency of advice across member firms.*